

CFTC Ex. 422

Message

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Sent: 6/1/2018 10:28:44 AM
To: Scott Gecas [sgecas@longleaftrading.com]
Subject: June Sales Action Plans
Attachments: June action plans.docx

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CFTC EXHIBIT

422

June Action Plan

James Hatzigiannis

Targets

- Close two customers (either as closer or opener)
- Hit average of 3 demo sets per working day – (June – 21 working days = 63 demo sets)

Key Action Items

- Take direction – consistently not listening to Scott's direction on sales pitch
- Bring positive attitude to work – this will help team and your own sales pitch
- Challenge the customer – don't be an order taker
- Nail down the rebuttals – need to be fluid with the answers
- Practice

June Action Plan

Connor Campo

Targets

- Close two customers (either as closer or opener)
- Hit average of 3 demo sets per working day – (June – 21 working days = 63 demo sets)

Key Action Items

- Nail down the rebuttals – need to be fluid with the answers
- Practice – you need to have the details down to make the conversation flow
- Focus this month more on the salesmanship and less on trading – we can discuss trading after work hours but need to be a top-notch salesman first
- Stay more scripted to focus conversation with the prospect --your anecdotal points are not fluid and focused yet

June Action Plan

Nick Gunther

Targets

- Close two customers (either as closer or opener)
- Hit average of 3 demo sets per working day – (June – 21 working days = 63 demo sets)

Key Action Items

- Need to be more conversational – currently very staccato and sounds like an interrogation
- Keep up positive attitude
- Learn application process as a backup
- Learn InsideSales lead management as a backup
- Develop with Scott and Jim communications strategy on weekly newsletter

June Action Plan

Ryan Dillman

Targets

- Close one customer (either as closer or opener)
- Hit average of 3 demo sets per working day – (June – 21 working days = 63 demo sets)

Key Action Items

- Start running customs this month – work with Scott on timing and structure
- Good tonality and salesmanship – keep up the good work
- Work on demo flake rescheduling – help Jim develop tool to track – need faster resolution
- Work on developing sense of urgency with the client

June Action Plan

Alex Stemper

Targets

- Close one customer (either as closer or opener)
- Hit average of 3 demo sets per working day – (June – 21 working days = 63 demo sets)

Key Action Items

- Start running customs this month – work with Scott on timing and structure
- Good tonality and salesmanship – keep up the good work
- Work on demo flake rescheduling – help Jim develop tool to track – need faster resolution
- Work on developing sense of urgency with the client
- Improve data quality – work with Jim on correct process

June Action Plan

Brian Adams

Targets

- \$300,000 in new money

Key Action Items

- Be more proactive on application follow-up especially in first few days after application
- Better communication with sales team on status – shared update page in One Drive
- Compliance duties outlined